Behavioural Research on Consumers' Energy Tariff Choices

Technical Report: Fieldwork March–April 2024

Prepared by BMG and Ofgem

Contents

Context and objectives

Ofgem is the regulator of Britain's gas and electricity markets. Ofgem's principal objective is to protect the interests of current and future consumers.

One of the ways that Ofgem protects consumers is by promoting effective competition.

For healthy competition to exist, it is important that:

- Consumers have access to clear, accurate and understandable information about tariffs and suppliers.
- Consumers are able to switch tariffs or suppliers easily and without unfair restrictions.
- There are tangible distinctions on the price attributes and/or service attributes of the tariffs they chose between.

Recent evidence from Ofgem's consumer research suggests that while there has been a small increase in switching in recent months, market engagement levels remain well below those seen before the advent of the global gas crisis in August 2021.[1] This may, in part, be due to:

- There are mixed levels of consumer understanding when it comes to engaging in the energy market.[2]
- The reduced financial benefits of switching. Evidence suggests that savings available from switching deals may well be lower than in June 2021.

In these market conditions, it is important to understand what might encourage greater competition and market engagement, and how this differs among different consumer groups. For instance, to what extent is a lack of understanding impacting market engagement? Are consumers over or underweighting the financial value of exit fees when making decisions about switching?

The overarching objective of the research was, therefore, to explore the attributes that influence consumer behaviour in the energy market. This ensures Ofgem has evidence to identify barriers and enablers that affect consumer engagement and switching decisions and develop robust policy to support effective market competition.

Overview of approach

Fieldwork was conducted from 29 March to 9 April 2024 using two approaches:

1. online surveys via online panels to capture the digitally enabled general population.
2. online river sampling to capture those digitally enabled but less present on panels.

Respondents are recruited through river sampling by inviting them to complete the survey while they are doing another online activity, for example through an online banner/advertisement. This enables data collection from individuals who are not active on panels. This helps to make the sample more representative of the general population than using a purely panel-based approach.

Quotas were set to ensure a representative sample of the GB population for gender, age, ethnicity, and region. Targets for the weighting included these variables in addition to ethnicity and Index of Multiple Deprivation (IMD).[3] All targets are based on proportions from the 2021 census and 2021 mid-year population estimates, except for payment type which is based on data provided by Ofgem and IMD which is based on the ONS release for 2019 in England and 2016 for Scotland. These were broadly

[1] See: Consumer impacts of market conditions survey: wave 5 (January to February 2024) | Ofgem
[2] Consumer impacts of market conditions survey - wave 4 (July 2023) | Ofgem
[3] Index of Multiple Deprivation is a measure used by the Office for National Statistics (ONS) to assess levels of deprivation across different areas in the UK. It combines data on income, employment, education, health, crime, housing, and the local environment to rank areas from most to least deprived.

achieved within the sample; any discrepancies were addressed through weighting, using the same proportions. More information on the sampling and weighting approach is provided below.

The research comprised 3,235 interviews in total (maximum confidence interval of ±1.72% at the 95% level of confidence). A breakdown of completions by mode is outlined below.

Table 1: Achieved interviews by sample approach

Method	Sample size (unweighted)
Online panel	3,103
River sampling	132
Total	3,235

Due to time constraints, fieldwork did not include any face-to-face interviews. Several similar studies and other social and consumer research studies rely on online samples whilst maintaining a good representation of the wider population. However, online methodologies do not represent the views of a small proportion of the population who are digitally excluded. Therefore, the findings are not entirely comparable with other Ofgem projects, which have included face-to-face interviews, including the Consumer Impacts of Market Conditions (CIM) surveys.

Questionnaire design

The questionnaire (see Appendix A) was developed by BMG based on Ofgem's research objectives and shared with Ofgem for sign-off. The process was iterative, with BMG making agreed amendments to the questionnaire based on feedback and input from Ofgem stakeholders.

BMG then used a final version of this questionnaire to script the survey into a version optimised for online administration. Qualtrics scripted the questionnaire and hosted it on its platform. Qualtrics was selected to provide this service primarily because it offers the option of a Conjoint module on its platform. Further details on the Conjoint experiment can be found below.

The survey asked a range of standard screening and demographic questions (using similar wording to those used in Ofgem's CIM and Energy Consumer Satisfaction Survey where possible to ensure quality and consistency) and comprised the following sections:

- Respondent's current energy deal
- Conjoint exercise (see below)
- Switching behaviour and perceptions
- Tariff understanding
- Exit fees
- Understanding of customer service ratings

Conjoint experiment

The survey included a Conjoint module, which is an effective tool for understanding how people make decisions in a more realistic way than traditional surveys. Instead of asking respondents to rate individual components separately, Conjoint analysis lets multiple attributes be considered at once, similar to how choices are made in real life. This approach provides deeper insights into what truly drives decision-making, as it reflects the trade-offs people naturally make between different factors when evaluating **their options.**

We used the Conjoint tool to test the impact of annual savings, customer service rating, exit fee level and tariff type on consumer choices of alternative energy deals. The central premise was to mimic the experience of comparing deals on a price comparison website.

The experiment presented respondents with a series of nine hypothetical choices, each one showing two energy deals. Respondents were asked to choose whether to switch to one of these deals or stick with their current real-life deal (as shown in the image below).

(1/9) Choose your preferred option below:

	Deal Option 1	Deal Option 2	None
ESTIMATED ANNUAL PRICE SAVING	£200 saving per year	£50 saving per year	Stick to my current deal
CUSTOMER SERVICE RATING (AS RATED BY OTHER CUSTOMERS)	★½☆☆☆ 1.5 stars	★★☆☆☆ 2 stars	
EARLY EXIT FEE IF YOU WANTED TO LEAVE THIS DEAL	£150 exit fee	£150 exit fee	
TARIFF TYPE AND LENGTHS	Fixed – 12 month	Fixed – 24 month	
	○	○	○

The purpose of the experiment was to simulate real-life decision-making around energy deals, where multiple attributes are weighed up simultaneously, to gain insight into what makes consumers more likely to switch to a new energy deal. The attributes included in the experiment were annual savings, exit fee, tariff type (fixed 12 months; fixed 24 months or variable), and customer service rating (presented as a visual star rating from 1 to 5). Respondents were presented with 9 separate choices at random, one after the other.

Table 2: Range of attributes tested in the conjoint exercise

Annual savings level	Exit fee	Tariff Type	Customer service rating (stars)
£0	£0	Fixed 12 months	1
£25	£50	Fixed 24 months	1.5
£50	£100	Standard variable	2
£75	£150		2.5
£100	£200		3
£150	£250		3.5
£200	£300		4
£300			4.5
			5

In order to keep the exercise accessible, we decided against including other tariff types such as green and time-of-use tariffs. It should be noted that the experiment is therefore limited in its capacity to reflect consumers' decision-making in the real energy market, as it was not possible for us to account for every possible deal available. More detail about how the resulting conjoint data was analysed is provided later.

Cognitive testing

Before launching fieldwork, we cognitively tested the questionnaire with six individuals to identify any potential problems or areas for improvement. Interviews were recruited by a specialist qualitative recruiter and the in-house team, using online methods to screen participants and ensure a wide range of energy consumers.

All participants had either sole or joint responsibility for paying energy bills in their households, including two consumers who had recently switched their energy tariff. These tests provided valuable feedback on the questionnaire flow, particularly the Conjoint experiment, and allowed us to make an informed judgement on how to structure this section so as not to overwhelm participants by presenting them with too many choices or questions. Based on cognitive interviews, we decided to reduce the number of choices presented to participants during the Conjoint experiment from 11 to 9.

Cognitive interviews were conducted from 14 – 20 March 2024 via Microsoft Teams, with BMG team members providing minimal guidance to participants as they interacted with the questionnaire while observing how participants responded to it. Interviewers also encouraged participants to describe their thought processes where possible and asked for their feedback on the ease/difficulty of answering some specific questions.

After recording the interviews, the team collected feedback and discussed it with Ofgem. The objective was to make necessary adjustments to the questionnaire, ensuring it aligned with the objectives and that all questions were clear and accessible.

Sampling approach

The sample was designed to be representative of Great Britain's population. Screening questions ensured participants met all of the following criteria:

- aged 18 or above
- residents of Great Britain, verified by their postcode
- have mains gas or electricity in their home
- solely or jointly responsible for their household's energy bills
- paying their energy bills directly to their supplier, rather than through other means such as included in their rent paid to a landlord

Online panel quotas

Quotas and weights were set for age, gender, region, ethnicity, Index of Multiple Deprivation (IMD)[4] and payment type, matching targets used in the Energy Consumer Satisfaction Survey, which BMG also runs for Ofgem as well as Citizens Advice. All targets are from the 2021 census and 2021 mid-year population estimates (ONS) except for payment type, which is based on data provided by Ofgem, and IMD using the targets from the ONS release for 2019 in England and 2016 for Scotland.

[4] The Index of Multiple Deprivation (IMD) is a measure of relative deprivation for small areas in the UK. It combines information from seven domains of deprivation: income, employment, health, education, crime, environment, and housing.

As recommended by Qualtrics, we used a panel exchange called PureSpectrum. This works with a network of panels which they blend together, allowing us to reach a broad sample of panel members.

Below is a full breakdown of targets alongside the achieved sample composition. Note that these quotas were applied for the online panel element only, with a tolerance of 20% applied within each cell to ensure quotas did not become too restrictive. However, as the tables below show, careful sample management and targeted recruitment meant that, in most cases, the final achieved completes were very close to the targets and well within the tolerance ranges.

The percentages cited below include interviews achieved by river sampling. Formal quotas are not possible for river sampling as participation is voluntary. However, the sample is ordered proportionately based on the online quotas. We achieved 132 completes through river sampling, which was fewer than our original target of 200. This was due to a short fieldwork period which also included a bank holiday, naturally resulting in lower rates of participation. We made up the shortfall using the panel approach.

As the tables below demonstrate, the demographics of survey participants closely matched the overall profile of the population.

Table 3: Profile of completed interviews against quotas, by age

Age of household reference person (2021 census)[5]	Target (%)	Achieved (%)
18-34	16%	16%
35-49	26%	26%
50-64	29%	29%
65+	29%	29%

Table 4: Profile of completed interviews against quotas, by gender

Gender (2021 mid-year population estimates, all persons)	Target (%)	Achieved (%)
Male	48%	47%
Female	52%	52%
Other / prefer not to say	-	1%

Table 5: Profile of completed interviews against quotas, by region

Region (2021 mid-year population estimates, all persons)	Target (%)	Achieved (%)
North East	4%	4%
North West	11%	11%
Yorkshire and the Humber	8%	8%
East Midlands	8%	8%
West Midlands	9%	9%

[5] Figures only available for England and Wales only as Scotland census estimates not yet released. The whole sample was weighted using these targets given age profile of Scottish household reference persons is likely to be similar.

East of England	10%	10%
London	13%	12%
South East	14%	13%
South West	9%	9%
Wales	5%	5%
Scotland	9%	9%
Prefer not to say	-	2%

Table 6: Profile of completed interviews against quotas, by Index of Multiple Deprivation

IMD quintile (ONS release for 2019 in England and 2016 for Scotland)	Target (%)	Achieved (%)
1st Quartile – Least deprived	20%	17%
2nd Quartile	20%	20%
3rd Quartile	20%	21%
4th Quartile	20%	21%
5th Quartile – Most deprived	20%	21%

Table 7: Profile of completed interviews against quotas, by ethnicity

Ethnicity (2021 census, all persons)[6]	Target (%)	Achieved (%)
White	82%	89%
Ethnic minority	18%	11%

Fieldwork process

Fieldwork soft launch

The survey was launched online first, with the early survey completes extracted and reviewed to 'sense-check' the data on 27 March 2024. These checks included ensuring that the number of valid responses was being correctly recorded and checking the survey logic and routing were working as intended. Once everything was confirmed as working, the online survey was fully launched on 29 March 2024. River sampling took place from 3 to 9 April 2024.

Main fieldwork

Fieldwork was undertaken from 29 March and 9 April 2024.

A total of 3,235 interviews were completed. Each online interview took approximately 10-15 minutes to complete.

[6] Figures only available for England and Wales only as Scotland census estimates not yet released. The whole sample was weighted using these targets.

Participants were offered a small incentive (to the value of around 50p) in the form of points or credit to their account for the panel they were members of. For river respondents, the option for respondents to earn points if they signed up for a panel or provided with offers of discounts and offers.

Weighting

The sample was weighted using the target percentages set out above in the sampling approach section for age, gender, region, Index of Multiple Deprivation (IMD), payment type and ethnicity.

Please note that this programme uses the same approach as the Energy Consumer Satisfaction Survey, where age is based on the household reference person, but all other targets are set for all persons in the household (with IMD calculated at the Lower-layer Super Output Area level).[7] This differs from the Consumer Impact of Market Conditions Survey, which uses all persons for age, resulting in a younger profile compared to both this research and the Energy Consumer Satisfaction Survey.

The effective sample size helps assess the impact of the weights on the unweighted sample. The effective sample size is a measure of the precision of the sampling approach and the efficiency of the weights. In essence, they help assess the strength and accuracy of the survey results by accounting for potential biases and uncertainties introduced by weighting factors. The overall effective sample size was 94%.

This is in the very high range, suggesting the sample selection process is working well and resulting in a highly efficient sample. Essentially, an effective sample size of 94% means that the weighted sample behaves as if it were 94% as large as the unweighted sample in terms of its capacity to produce accurate and unbiased estimates. It indicates that the weighting adjustments, while necessary to ensure the sample accurately represents the broader population, have only modestly reduced the sample's statistical efficiency.

Table 8: Profile of completed interviews, weighted and unweighted

Subgroup	Unweighted completes	Weighted completes
Male	1,530	1,547
Female	1,695	1,674
18-34	511	518
35-49	833	841
50-64	946	938
65+	945	938
North East	121	120
North West	350	346
Yorkshire and the Humber	260	259
East Midlands	254	251
West Midlands	288	286
East of England	333	316
London	381	414

[7] The term "household reference person" refers to the individual in a household who is acknowledged as the head for statistical purposes.

South East	420	448
South West	285	279
Wales	163	156
Scotland	303	287
1st Quartile – Least deprived	539	626
2nd Quartile	642	630
3rd Quartile	653	636
4th Quartile	656	625
5th Quartile – Most deprived	660	632
Standard credit	371	388
Prepayment meter	452	453
Direct debit	2,412	2,394
White	2,870	2,649
Ethnic minority	354	571

Quality checks

To maintain the highest data quality, we implemented several checks. These include questions designed to identify and filter out respondents who rush through surveys (speeders), with additional steps to remove such responses post-survey.

Quality checks on the raw data included removing or reviewing participants who:

- input irrelevant or similar responses to the open-ended questions throughout the survey
- demonstrated straight-lining behaviours throughout the survey[8]
- may have taken part in the survey more than once, based on their postcode, demographic, and IP address data
- completed the survey in a short period of time, with outliers identified through the distribution of response times
- gave a particularly high or low response to any numeric question (outliers)
- took part in the survey from an IP address outside of the UK or that was linked to some sort of a proxy (e.g. VPN), crawler, TOR network, or had a medium/high threat level

The survey also incorporated postcode validation checks to verify respondents' locations. The panel component also uses a well-established, high-quality panel partner to help ensure the integrity of our data.

Our commitment to quality extends to our data-checking process. We meticulously reviewed our data tables, focusing on verifying the application of weights, the accuracy and consistency of cross-break creation, and the correct application of significance testing. These steps ensure that our findings are not only accurate but also meaningful and reliable for decision-making.

No data entry phase was required for this survey. The programmed script ensured that all question routing was performed automatically, and no post-editing of the data was required in the way that might be necessary for surveys administered using a 'pencil and paper' method.

[8] Straight-lining is giving the same response for every question e.g. rating everything as 'very important'.

The survey included one open-ended question and several 'other specify' questions, for which responses were coded. BMG's in-house coding team carried out the coding, reading verbatim responses and developing a draft code frame of the most common themes, which was reviewed by the research team; this framework was developed further and added to as fieldwork progressed.

A separate reviewing team further quality-checked the coding process, reviewing a random selection of all coded verbatims (5% of total). This included checks to ensure the coding had been applied correctly (including assigning multiple codes where relevant).

Data analysis and checking

The processed and weighted survey data was used to create a set of data tables containing crossbreaks for analysis.[9] These tables included data for all of the survey questions, as crossbreaks which were agreed in advance with Ofgem (for example age, gender, tariff type, payment method etc).

The tables also contained composite variables which combined data from multiple questions or survey codes, for example on participants' understanding of the energy market or how vulnerable they were to the cost of living crisis. The two main composite variables were:

- **Financial vulnerability:** The variable measures the financial security of each consumer and is calculated from their ability to save in the next 12 months, their ability to deal with an unexpected bill and recent borrowing habits. These three metrics combined – saving, debt and unexpected expenses – allowed us to determine four categorisations of financial vulnerability:
    - Highly vulnerable – those not able to save, and who cannot afford unexpected expenses and who are borrowing more than usual
    - Vulnerable – those not able to save, and who either cannot afford an unexpected expense or are borrowing more than usual
    - Getting by – those who expect to save or can afford unexpected expense, and who are not borrowing more than usual
    - Doing well – those who expect to save in the next 12 months, can afford an unexpected £850 expense, and who are not borrowing more than usual

- **Energy understanding:** This composite variable measures how well consumers understand and navigate their energy options. The questions assess respondents' understanding across a series of survey metrics, including their engagement with their energy tariff type, their energy usage and spending, and familiarity with key information like the Meter Point Administration Number (MPAN). They also explore whether respondents find it challenging to compare energy deals, their understanding of different tariff types and their associated benefits, and their awareness of exit fees and how they work.

  Each metric was given a score of 1 for responses indicating knowledge, and 0 for those that did not. Respondents' scores were then grouped into four categories based on their total.

    - Very Good (12-15)
    - Good (8-11)
    - Poor (4-7)
    - Very Poor (0-3)

The data tables were thoroughly checked prior to finalisation. This included checks to ensure they contained data for all survey questions, all specified crossbreaks and downbreaks had been included,

[9] Crossbreaks refer to the process of segmenting tabulated data by specific variables (such as age, gender, or income level) to examine how responses or outcomes vary across different subgroups within the sample. This allows for comparisons between these groups, revealing potential patterns or differences in the data.

routing had been correctly applied to survey questions, base sizes added up and matched their descriptions, derived variables and summed nets added up, and weighting had been correctly applied. At the reporting stage, a senior researcher conducted additional checks to ensure the stated percentages and bases matched the data presented in the tables and that any conclusions drawn were accurate.

Only findings that were statistically significant at the 95% confidence level were reported on. The analysis focused on identifying differences between key demographic groups (e.g., age, gender, financial vulnerability) and other relevant variables to highlight significant patterns or trends in the data. These findings help ensure that any reported differences are unlikely to have occurred by chance.

Conjoint Data Analysis

Analysis overview

This research employed Max-diff conjoint analysis, that converted into numerical scores called utilities using a Hierarchical Bayesian (HB) regression model[10]. Whilst there are different types of conjoin analysis, this approach was considered more appropriate to address the research questions.

The two main analysis metrics calculated from the utility scores are outlined below.

- **Feature importance:** This metric indicates the overall importance of each attribute (e.g., price, contract length, customer service) in a consumer's decision-making process relative to the other attributes. In this case, feature importance helps us understand how much deal savings influence the choice of an energy deal compared to other factors like exit fees or customer service ratings. The process for calculating *feature importance* involves several steps:
    1. **Range of utilities**: The range of utility scores for each attribute is calculated. A larger range indicates stronger preferences for certain options within that attribute.
    2. **Attribute comparison**: Compare the overall ranges between attributes to determine which has the most influence on decision-making. The interval ranges between levels within each attribute are then used to calculate preference shares (explained below).
    3. **Proportional importance**: Each attribute's range is divided by the total range of all attributes to give a proportional importance score.
    4. **Average feature importance**: These proportional importance scores are averaged across respondents and weighted to give a sense of how much weight each feature carries in the decision process.
- **Preference shares:** Utility scores measure how much value consumers place on different levels within a single attribute, such as various price savings or the range of customer service ratings. These scores are then used to calculate preference shares, which estimate the likelihood that consumers will choose one deal over another at specific levels of each feature. For example, this analysis allows us to compare how likely a consumer is to choose a deal offering £100 savings versus £50 savings.

  The range of each attribute and the size of the differences between levels indicate how much variation there is in consumer preferences for specific features. In our analysis of preference shares, all other attributes are typically held at their most favourable or "optimal" levels. For

[10] Maximum Difference Scaling (MaxDiff) is a discrete choice-based method grounded in random utility theory, to elicit respondents' relative preferences across a defined set of items. MaxDiff was selected due to its methodological advantages over traditional rating or ranking techniques, particularly its ability to reduce scale-use bias and enhance discrimination among attributes. The resulting choice data were analysed using a Hierarchical Bayesian (HB) regression model, which facilitates the estimation of individual-level utility scores by integrating both respondent-specific and population-level parameters. This modelling approach is especially valuable in academic research contexts where precision and robustness of preference estimation are essential, particularly when individual-level data are limited.

instance, when testing the effect of different annual savings amounts on the likelihood of selecting a deal, the analysis assumes a 5-star rating, no exit fee, and a fixed 12-month tariff.

Using these metrics, we conducted a more in-depth analysis across key subgroups. We compared feature importance and preference share scores by demographic factors like age, payment method, and financial vulnerability. This helped uncover trends and variations in how different groups prioritise features.

We also applied Spearman's rank correlation to examine relationships between variables.[11] For example, we explored how the propensity to switch providers is linked to exit fee understanding at different savings levels as understanding increases.

Interpreting the findings

The analysis gives us valuable insights into what matters most to consumers when choosing an energy deal. However, it is important to note that this type of research does not capture the full range of real-world factors. While Conjoint analysis more realistically mimics decision-making by considering multiple attributes at once, it is still, like all survey research, conducted in a somewhat artificial environment.

For instance, the propensity to switch observed in the survey might be exaggerated. In the survey, respondents only had to click a button to indicate their preference, whereas in reality, switching providers involves more administrative effort and time, which can limit the actual number of people who switch.

Additionally, in real-life settings such as comparison websites, the hierarchy of information might be unevenly presented. While all attributes are considered equally in the survey, comparison sites often prioritise certain information like savings. At the same time, details such as exit fees may be presented less prominently, in smaller print or hidden in less obvious sections.

Nonetheless, the findings offer meaningful lessons about the key drivers of consumer choices and how different levels of attributes interact. It provides a better understanding of the dynamics involved, helping to inform decisions about which features are most likely to influence consumer behaviour.

Statistical significance

Statistical significance is a measure used to determine the likelihood that the results observed in a survey are due to chance rather than a specific factor or intervention. It helps in assessing whether the patterns and differences found in the data are genuine and can be reliably used to infer conclusions about the broader population.

Given that the survey uses quotas rather than random probability sampling, statistical significance is indicative only, but still a useful measure of where differences are meaningful.

Where significant differences between subgroups and the total sample are identified, 'total sample' represents the total sample minus the subgroup in question. Significant differences in reporting are calculated at a 95% confidence level. Only where a difference is statistically significant is it discussed in the analysis of the report.

In the data tables, letters are employed to highlight significant differences when comparing one subgroup to others in the tables, or to compare subgroups against the total. These groups are identified by corresponding letters placed beneath the column headers in the cross-break section of the table. A letter

[11] Spearman's rank correlation measures the strength and direction of the relationship between two ranked variables. It gives a coefficient between -1 and 1, where 1 indicates a perfect positive relationship, -1 a perfect negative relationship, and 0 means no relationship. This method is useful for identifying consistent patterns, even if the relationship is not linear.

underneath a percentage figure means the figure is significantly higher at 95% confidence interval than for the group denoted by the letter.

Colour-coding is used to highlight significant differences when comparing a subgroup to the total minus the subgroup in question. A red highlighted figure signifies that the subgroup is significantly lower than the total at 95% confidence interval, a green figure signifies that it is significantly higher. See example image below.

Table 30

Ofgem - Tariff Choice Research

A7: Overall, how would you rate the customer service you have received from your current supplier(s)?

Base: All respondents

		Gender			Age					
	Total (A)	Male (B)	Female (C)	Non-binary (D)	18 - 24 (E)	25 - 34 (F)	35 - 49 (G)	50 - 64 (H)	65 - 74 (I)	75+ (J)
Unweighted row	3235	1530	1695	8	147	364	833	946	711	234
Effective Sample Size	3048	1439	1600	7	132	329	767	903	693	229
Base: Total	3235	1547	1674	10	153	365	841	938	706	232
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
0-1	168	87	79	2	2	9	45	60	41	12
	5%	6%	5%	16%	1%	2%	5%	6%	6%	5%
	,P,V,E,F,K						E,F,K	E,F,K	E,F,K	E
2-3	1102	537	557	5	51	127	297	341	226	61
	34%	35%	33%	46%	33%	35%	35%	36%	32%	26%
	2,F1,X,J,N					J	J,N	J,N		
4-5	1948	915	1028	4	101	226	493	531	438	158
	60%	59%	61%	39%	66%	62%	59%	57%	62%	68%
	,R1,Q,H,M				H,M				H,M	A,G,H,L,M
Unsure	17	8	10	-	-	3	6	6	2	1
	1%	0%	1%	-	-	1%	1%	1%	0%	0%
	T,W,Y,E,D	D	D				E	E		
Prefer not to say	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-

Statistical tests run on the data outputs from this project are the Default Wincross Tests. These are as follows:

- Independent T-Test for means, assuming unequal variances (the formula for which is shown below)

$$t = \frac{\overline{\{X\}}_1 - \overline{\{X\}}_2}{\sqrt{\left(\frac{1}{n} - \frac{1}{m}\right)^2 m s_m^2 + \frac{n - m}{n^2} s^2_{\{n-m\}}}}$$

- Independent Z-Test for percentages, using unpooled proportions (the formula for which is shown below)

$$z = \frac{p_1 - p_2}{\sqrt{\frac{p_{1(1-p_1)}}{n_1} + \frac{p_{2(1-p_2)}}{n_2}}}$$

Accessibility

In order to make the findings in our report accessible, we created alt-text describing graphs so that people using screen readers would be able to understand them.

The data tables were presented as in the image below.

B1_A: What kind tariff are you on for gas?

Base: Have Gas

		Gender	
	Total (A)	Male (B)	Female (C)
Unweighted row	2806	1311	1485
Effective Sample Size	2640	1230	1403
Base: Total	2816	1335	1467
	100%	100%	100%
Gas – a fixed rate tariff	1162	559	597
	41%	42%	41%
	,S1,Y,H,M		
Gas – a standard variable tariff	1428	693	729
	51%	52%	50%
	1,A1,E,F,K		
Other	24	13	11
	1%	1%	1%
	,Q,R,F,K,D	D	D
Unsure	195	67	126
	7%	5%	9%
	S1,E,F,K,B		A,B
Prefer not to answer	7	2	4
	0%	0%	0%
	,Y,H,J,M,D		D

Data retention & GDPR

All staff at BMG have received the appropriate level of training to ensure they are fully familiar with the requirements of GDPR. New staff receive a two-hour training session on Information Security and GDPR as part of the induction process.

As a registered Data Handler (Registration No. Z5081943), we have a dedicated team of database analysts, headed up by an ISEB (Information Systems Examination Board) qualified Business Systems Director, and we have all of the necessary safeguards in place to ensure Data Protection procedures are adhered to. All survey data is electronic and is kept anonymised. It is destroyed in line with MRS and data protection guidelines – which requires all personally identifiable information to be destroyed a year after it was collected, all non-identifiable information which is not required for tracking purposes will be destroyed after 2 years.

BMG adheres to the following to provide quality and provide clients with assurance:

- ISO 20252:2019; MQA Ltd – 28.02.2011 to 28.02.2023; Scope: Provision of Market Research services; Certificate Number: 0515
- The International Standard for Information Security Management ISO 27001:2013;
- Interviewer Quality Control Scheme (IQCS) Member Company
- Registered under the Data Protection Act - Registration No. Z5081943
- Cyber Essentials Plus certification - ECSC Group PLC; Scope: BMG Research Limited UK Operations; Certificate no.: 4869492354715189

Appendix: Survey questionnaire

Section 1: Screening Questions

Base: All respondents

SINGLE RESPONSE

PROVIDE POSTCODE. This survey requires respondents to give their full postcode. Are you happy to provide this?

This information will only be used for statistical purposes to analyse the results by specific areas, such as Local Authority, Constituency and Government areas. Asking for your postcode saves you time and helps us to report more accurate information. All answers will be treated entirely anonymously, and postcode information will not be used for any other purpose.

Fixed codes	Answer list	Scripting notes	Routing
1	Yes		
2	No		

Base: If respondent agrees to provide postcode (PROVIDEPOSTCODE = 1)

OPEN RESPONSE, POSTCODE FORMATTING & VALIDATION APPLIED, SCREENOUT IF OUTSIDE GB

S13. Could you please provide your full postcode?

Please ensure to include a space where applicable, e.g. AB1 2CD

Please note that this information will only be used by BMG Research to explore geographical variation in responses.

Fixed codes	Answer list	Scripting notes	Routing
1		open response, **SCREENOUT IF OUTSIDE GB**	

Base: All respondents (for quotas)

SINGLE RESPONSE

S13B. Please can you tell us which region you live in?

Please select only one

Fixed codes	Answer list	Scripting notes	Routing
1	East of England		
2	East Midlands		
3	London		
4	North East		
5	North West		
6	Scotland		
7	South East		

8	South West		
9	Wales		
10	West Midlands		
11	Yorkshire and the Humber		
96	None of these	screenout	

ASSIGN REGION BASED ON BASIS OF S13 OR S13B

ASSIGN IMD ON BASIS OF S13 (QUINTILE) – NO CATEGORY ASSIGNED IF POSTCODE NOT PROVIDED

S13A AND S13B TO DRIVE REGIONAL AND IMD QUOTAS + COLLECT URBAN+RURAL INFORMATION

Base: Refused to give postcode (PROVIDEPOSTCODE = 2)

SINGLE RESPONSE

S14. And what type of area do you live in?

Please select only one

Fixed codes	Answer list	Scripting notes	Routing
1	**An urban area** Urban areas are within cities or towns. Lots of people live there, and there are lots of different kinds of buildings that are close together.		
2	**A suburban area** These areas are just outside of cities or towns. There are lots of houses and maybe some apartments there, but not as many other buildings as in urban areas – there may be a few small shops.		
3	**A rural area** Fewer people live here compared to urban or suburban areas, and homes tend to be spaced further apart. There will be lots of nature and open spaces.		
97	Unsure		
98	Prefer not to say		

ASSIGN URBAN-RURAL ON BASIS OF S13 OR S14 (S14 = 2 IS URBAN)

Base: All respondents

SINGLE RESPONSE

S1. Do you have mains gas and/or mains electricity in your home?

Please select one only

Code	Answer list	Scripting notes	Routing
1	Mains gas only		
2	Mains electricity only		
3	Mains gas and electricity		
4	Neither		screenout
97	Unsure		screenout
98	Prefer not to answer		screenout

Base: If mains gas only (S1=1)

SINGLE RESPONSE

S2. You said you only have mains gas and do not have mains electricity in your home. Can you just confirm that this is correct?

Please select one only

Code	Answer list	Scripting notes	Routing
1	Yes – I have mains gas only		
2	No – I have mains electricity only		
3	No – I have mains gas and electricity		
97	Unsure		screenout

Base: If mains gas and electricity (S1=3 OR S2=3)

SINGLE RESPONSE

S3. Please can you tell me if you receive your gas and electricity from the same supplier or different suppliers?

Please select one only

Code	Answer list	Scripting notes	Routing
1	Same supplier for my gas and electricity		
2	Different suppliers for my gas and electricity		
97	Unsure		screenout
98	Prefer not to answer		screenout

hidden variable

Energy type

LABEL	CODE	CODE IF
Mains gas only	1	S2 = 1
Mains electricity only	2	S1 = 2 OR S2 = 2
mains gas and electricity only	3	S1 = 3 OR S2 = 3

Base: All respondents

SINGLE RESPONSE

S4. Are you responsible – **either solely or jointly** – for your household's energy bills or for choosing your household's energy supplier?

Please select one only

Code	Answer list	Scripting notes	Routing
1	Yes		
2	No		screenout
98	Prefer not to say		screenout

Base: All respondents

SINGLE RESPONSE

S5. Do you pay your energy bills to your energy supplier, or do you pay as part of another payment, for example, as part of rent to your landlord?

Please select one only

Code	Answer list	Scripting notes	Routing
1	Pay bills to the supplier (i.e. direct debit, pay on receipt of bill, pre-payment meter)		
2	Pay as part of another payment (i.e. as part of rent to your landlord or payments for student accommodation).		screenout
98	Prefer not to say		screenout

Base: All respondents

NUMERIC RESPONSE, CAP AT 110, ONLY PERMIT NUMBERS

S9. Please can you tell me your age at your last birthday?

Please type your response in the box below

[_____]

SCREEN OUT IF BELOW 18

Fixed codes	Answer list	Scripting notes	Routing
98	Prefer not to say	**FIX, EXCLUSIVE**	**GO TO S9A**

Base: Where do not want to provide exact age (S5 = 98)

SINGLE RESPONSE

S9A. Can you tell us which band your age falls within?

Please select one only

Fixed codes	Answer list	Scripting notes	Routing
1	Under 18	**SCREENOUT**	
2	18 - 24		
3	25 - 34		
4	35 - 49		
5	50 - 64		
6	65 - 74		
7	75 or older		
97	Prefer not to say	**SCREENOUT**	

ASSIGN AGE BAND (SAME BANDS AS S9A) BASED ON S9 OR S9A

Base: All respondents

SINGLE RESPONSE

S10. Which of the following best describes your gender?

Please select one only

Code	Answer list	Scripting notes	Routing
1	Male		
2	Female		
3	Non-binary		
95	Other		
98	Prefer not to say		

Base: All respondents

Single response

H9. What is your ethnic group?

Please select one only

Row Code	Row list	Scripting notes	Routing
	White	WHITE ETHNICITY SUMMARY GROUP	
1	English / Welsh / Scottish / Northern Irish / British	WHITE ETHNICITY SUMMARY GROUP	
2	Irish	WHITE ETHNICITY SUMMARY GROUP	
3	Gypsy or Irish Traveller	WHITE ETHNICITY SUMMARY GROUP	
4	Any other White background	WHITE ETHNICITY SUMMARY GROUP	
	Mixed / Multiple ethnic groups	ETHNIC MINORITY SUMMARY GROUP	
5	White and Black Caribbean	ETHNIC MINORITY SUMMARY GROUP	
6	White and Black African	ETHNIC MINORITY SUMMARY GROUP	
7	White and Asian	ETHNIC MINORITY SUMMARY GROUP	
8	Any other Mixed / Multiple ethnic background	ETHNIC MINORITY SUMMARY GROUP	
	Asian / Asian British	ETHNIC MINORITY SUMMARY GROUP	
9	Indian	ETHNIC MINORITY SUMMARY GROUP	
10	Pakistani	ETHNIC MINORITY SUMMARY GROUP	
11	Bangladeshi	ETHNIC MINORITY SUMMARY GROUP	
12	Chinese	ETHNIC MINORITY SUMMARY GROUP	
13	Any other Asian background	ETHNIC MINORITY SUMMARY GROUP	
	Black / African / Caribbean / Black British	ETHNIC MINORITY SUMMARY GROUP	
14	African	ETHNIC MINORITY SUMMARY GROUP	

15	Caribbean	ETHNIC MINORITY SUMMARY GROUP	
16	Any other Black / African / Caribbean background	ETHNIC MINORITY SUMMARY GROUP	
	Other ethnic group	ETHNIC MINORITY SUMMARY GROUP	
17	Arab	ETHNIC MINORITY SUMMARY GROUP	
95	Any other ethnic group	ETHNIC MINORITY SUMMARY GROUP	
98	Prefer not to say		

Section 2: Profiling current energy deal

INTRO TEXT

Great, you have qualified to take this survey! Now, some more questions about your energy supplier and current tariff …

Base: Electricity only OR dual fuel (S1 = 2,3 OR S2 = 2,3)

SINGLE RESPONSE

A3. Please can you tell me which company you pay your electricity bill to?

Please select one only

Code	Answer list	Scripting notes	Routing
1	Boost Energy		
2	British Gas		
3	Your Co-op (previously Co-operative)		
4	E Gas and Electricity		
5	Ecotricity		
6	EDF Energy		
7	E.ON / E.ON Next		
8	ESB Energy		
9	London Power		
11	Octopus Energy		
12	Outfox the market (Foxglove Energy)		
13	Ovo Energy		
14	Sainsbury's		
15	Scottish Power		
16	Shell Energy		
17	So Energy		
18	SSE		
19	Utilita		
20	Utility Warehouse		
95	Other (please specify)	other specify	coding: Please recode any suppliers that people type in - e.g. British Gas. But don't code non-suppliers.

Base: (Gas only OR (gas and electricity AND different suppliers for gas/electric)) S2 = 1 OR (S1=3 AND S3=2) OR (S2=3 AND S3=2)

SINGLE RESPONSE

A4. Which company do you pay your gas bill to?

Please select one only

Code	Answer list	Scripting notes	Routing
1	Boost Energy	hide if answered at a3	
2	British Gas	hide if answered at a3	
3	Your Co-op (previously Co-operative)	hide if answered at a3	
4	E Gas and Electricity	hide if answered at a3	
5	Ecotricity	hide if answered at a3	
6	EDF Energy	hide if answered at a3	
7	E.ON / E.ON Next	hide if answered at a3	
8	ESB Energy	hide if answered at a3	
9	London Power	hide if answered at a3	
11	Octopus Energy	hide if answered at a3	
12	Outfox the market (Foxglove Energy)	hide if answered at a3	
13	Ovo Energy	hide if answered at a3	
14	Sainsbury's	hide if answered at a3	
15	Scottish Power	hide if answered at a3	
16	Shell Energy	hide if answered at a3	
17	So Energy	hide if answered at a3	
18	SSE	hide if answered at a3	
19	Utilita	hide if answered at a3	
20	Utility Warehouse	hide if answered at a3	
95	Other (please specify)	other specify	coding: Please recode any suppliers that people type in - e.g. British Gas. But don't code non-suppliers.

hidden variable

Energy type

LABEL	CODE	CODE IF	Text TO PIPE AT B!
Mains gas only	1	S2 = 1	mains gas
Mains electricity only	2	S1 = 2 OR S2 = 2	Mains electricity
mains gas and electricity	3	S1 = 3 OR S2 = 3	mains gas and electricity

Base: Have Gas [S2 =1 OR (S1 = 3 OR S2 = 3)]

SINGLE RESPONSE

B1_A. In this survey, we will ask some questions about energy 'tariffs'. An energy tariff is the pricing plan for your energy you use. The next few questions will ask about this.

What kind **tariff are you on for gas?**

Please select one only

Code	Answer list	Scripting notes	Routing
1	**Gas – a fixed rate tariff** This means that the tariff has a definite end date, and you pay a set rate per unit of energy. These tariffs often state the length in their name, such as a 12-month fix or an August 2023 fix.		
2	**Gas – a standard variable tariff** This means that the tariff doesn't have an end date. The price you pay for each unit of energy may vary within the energy price cap (sets the maximum price that can be charged for each kilowatt hour of energy used).		
95	Other (please specify)	OPEN TEXT BOX	
97	Unsure		
98	Prefer not to answer		

Base: Have Electricity [(**S1 = 2 OR S2 = 2) OR (S1 = 3 OR S2 = 3)**]

SINGLE RESPONSE

B1_B. In this survey, we will ask some questions about energy 'tariffs'. An energy tariff is the pricing plan for your energy you use. The next few questions will ask about this.

What kind **tariff are you on for electricity?**

Please select one only

3	**Electricity – a fixed rate tariff** This means that the tariff has a definite end date, and you pay a set rate per unit of energy. These tariffs often state the length in their name, such as a 12 months fix or an August 2023 fix.		
4	**Electricity – a standard variable tariff** This means that the tariff doesn't have an end date. The price you pay for each unit of energy may vary.		
95	Other (please specify)	OPEN TEXT BOX	
97	Unsure		
98	Prefer not to answer		

Base: Electricity only OR 'electricity and gas' (S1=2,3 OR S2=2,3)

SINGLE RESPONSE

B3. How do you currently pay your **electricity** bills?

Please select one only

Code	Answer list	Scripting notes	Routing
1	A regular direct debit or standing order		
2	Pay only on receipt of a bill by cash/cheque/debit or credit card/BACS/App		
3	I have a pre-payment meter, so I pay in advance by putting credit on a key, card or App		
4	Another method		
97	Unsure		
98	Prefer not to answer		

Base: gas only OR 'electricity and gas' (S1=1,3 OR S2=1,3)

SINGLE RESPONSE

B4. How do you currently pay your **gas** bills?

Please select one only

Code	Answer list	Scripting notes	Routing
1	A regular direct debit or standing order		
2	Pay on receipt of a bill by cash/cheque/debit or credit card/BACS/App		

3	I have a pre-payment meter, so I pay in advance by putting credit on a key, card or App		
4	Another method		
97	Unsure		
98	Prefer not to answer		

DUMMY VARIABLE:

PAYMENTTYPE

DIRECT DEBIT IF [B3 = 1 AND B4 ≠ 2/3] OR [B4 = 1 AND B3 ≠ 2/3]

STANDARD CREDIT IF [B3 = 2 OR B4 = 2] AND [B3 ≠ 3 AND B4 ≠ 3]

PREPAYMENT METER IF [B3 = 3 OR B4 = 3]

Base: All respondents

SINGLE RESPONSE

C4. Which, if any, of these have you or your household done **IN THE PAST 6 MONTHS?**

Please select only one

Fixed codes	Answer list	Scripting notes
1	I/we have compared energy tariffs but have not switched	
2	I/we have switched tariff with the same supplier	
3	I/we have actively switched to a new supplier	
4	I/we have passively switched to a new supplier (e.g. by moving house or supplier changed hands)	
96	None of these	FIX AT END
97	Don't know	FIX AT END
98	Prefer not to say	FIX AT END

Base: All who have switched or compared in the past 6 months (C4 = 1-3)

MULTI RESPONSE, RANDOMISE

C4A. You said that your household has [IF C4=1 "compared energy tariffs but have not switched" / IF C4= 2 "switched tariff with the same supplier" / IF C4=3 "switched to a new supplier"] **IN THE PAST 6 MONTHS.** How did you search for the information you were looking for?

Please select all that apply

Fixed codes	Answer list	Scripting notes
1	Directly with suppliers/my supplier (e.g. by phoning them up or searching on their website)	
2	Through a price comparison website (e.g. GoCompare, Compare the Market, Uswitch)	

3	By looking for advice from experts/sources like Martin Lewis or Money Supermarket	
95	Other (please specify)	Fix
96	None of these	FIX, EXCLUSIVE
97	Don't know	FIX, EXCLUSIVE
98	Prefer not to say	FIX, EXCLUSIVE

Base: All who have compared in last 6 months (C4 = 1)

MULTI RESPONSE, RANDOMISE

D4. You mentioned that your household has compared suppliers in the last 6 months. Why did your household compare suppliers?

Please select all that apply

Fixed codes	Answer list	Scripting notes
1	Wanted a cheaper tariff / deal	
2	Wanted a supplier that has a better reputation	
3	Wanted a better known/ more well-established supplier	
4	To find a supplier with better customer service / easier to deal with	
5	Wanted a green tariff	
6	Wanted a fixed tariff (fixed term, fixed price)	
7	Wanted a variable tariff	
8	Worried about previous/current supplier going out of business	
9	Was moved to a supplier I did not want after my supplier failed	
10	Wanted a time of use tariff	
11	Wanted Electric Vehicle (EV) tariff	
12	Was having issues with my current supplier or tariff	
13	Looking for better rewards or loyalty incentives	
14	Wanted a tariff with a lower exit fee	
95	Other reason (specify)	FIX AT END, OPEN TEXT BOX
96	No particular reason	EXCLUSIVE AND FIX AT END
97	Don't know	EXCLUSIVE AND FIX AT END
98	Prefer not to say	EXCLUSIVE AND FIX AT END

Base: All who have switched in last 6 months (C4 = 2,3)

MULTI RESPONSE, RANDOMISE

D4B. You mentioned that your household has switched tariffs or suppliers in the last 6 months. Why did your household switch suppliers?

Please select all that apply

Fixed codes	Answer list	Scripting notes
1	Wanted a cheaper tariff / deal	
2	Wanted a supplier that has a better reputation	SHOW ONLY IF C4 = 3
3	Wanted a better known/ more well-established supplier	SHOW ONLY IF C4 = 3
4	To find a supplier with better customer service / easier to deal with	show only if c4 = 3
5	Wanted a green tariff	
6	Wanted a fixed tariff	
7	Wanted a variable tariff	
8	Worried about previous/current supplier going out of business	
9	Was moved to a supplier I did not want after my supplier failed	show only if c4 = 3
10	Wanted a time of use tariff	
11	Wanted Electric Vehicle (EV) tariff	
12	Was having issues with my current supplier or tariff	
13	Looking for better rewards or loyalty incentives	
14	Wanted a tariff with a lower exit fee	
95	Other reason (specify)	FIX AT END, OPEN TEXT BOX
96	No particular reason	EXCLUSIVE AND FIX AT END
97	Don't know	EXCLUSIVE AND FIX AT END
98	Prefer not to say	EXCLUSIVE AND FIX AT END

Base: All respondents

GRID, SINGLE RESPONSE PER ROW

D3. How likely do you think it is that you or someone in your household will do these things over **the next three months?**

Please select only one for each statement

ROWS

Fixed codes	Answer list	Scripting notes
1	Compare energy tariffs	
2	Switch to a new tariff with my current supplier	
3	Switch to a new tariff with a new energy supplier	

Columns

Fixed codes	Answer list	Scripting notes
1	Definitely will	
2	Probably will	
3	Unsure	
4	Probably will not	
5	Definitely will not	
98	Prefer not to say	

Base: All respondents

SINGLE RESPONSE

C5. Thinking about energy deals out there right now, how likely, if at all, do you think there are energy deals that offer better value for money than your current deal?

Please select only one

Code	Answer list	Scripting notes	Routing
1	Very likely		
2	Fairly likely		
3	Not very likely		
4	Not likely at all		
97	Don't know		

Base: All who say it's likely there are better value energy deals available than their current deal (C5 = 1 OR 2)

SINGLE RESPONSE

C5A. You said you think it's likely there are better value energy deals available than your current deal. Do you think the savings offered by these deals would be likely to be marginal or substantial?

The deal(s) likely represent …

Please select only one

Code	Answer list	Scripting notes	Routing
1	Very substantial savings		
2	Fairly substantial savings		
3	Fairly marginal savings		
4	Very marginal savings		
97	Don't know		

Base: All respondents

CAROUSEL, SINGLE RESPONSE PER ROW, RANDOMISE

C6. Considering your current energy deal, how well do you feel you know the following details?

Please select one only

ROW

Code	Answer list	Scripting notes	Routing
1	My rough usage (kWh, whether monthly, quarterly or annually)		
2	How much I spend on energy (whether monthly, quarterly or annually)		
3	Where to find my Meter Point Administration Number (MPAN)		

COLUMN

Code	Answer list	Scripting notes	
1	I know this without having to check		
2	I don't know this but am confident I could find this information		
3	I don't know this and am **not** confident I could find the information		
97	Don't know		

Base: All respondents

SINGLE RESPONSE, KPI, STAR FORMAT

A7. Overall, how would you rate the **customer service** you have received from your current supplier(s)?

Please select one only

Code	Answer list	Scripting notes	Routing
1	0 stars	STAR FORMAT	
2	0.5 stars	STAR FORMAT	
3	1 star	STAR FORMAT	
4	1.5 stars	STAR FORMAT	
5	2 stars	STAR FORMAT	
6	2.5 stars	STAR FORMAT	
7	3 stars	STAR FORMAT	
8	3.5 stars	STAR FORMAT	
9	4 stars	STAR FORMAT	
10	4.5 stars	STAR FORMAT	
11	5 stars	STAR FORMAT	
97	Unsure		
98	Prefer not to answer		

Base: Respondents with mains gas, mains electricity or mains gas and electricity

SINGLE RESPONSE, ONCE ONE BOX IS TYPED IN GREY OUT THE OTHERS, ONLY ONE BOX CAN BE FILLED IN

C7A. Roughly how much does your household spend on [PIPED BASED ON ENERGY TYPE: **gas / electricity / gas and electricity**] **per year**?

TEXT TO PIPE

ENERGY TYPE CATEGORY	CODE	CODE IF	
Mains gas only	1	S2 = 1	**gas**
Mains electricity only	2	S1 = 2 OR S2 = 2	**electricity**
mains gas and electricity only	3	S1 = 3 OR S2 = 3	**gas and electricity**

Roughly….

Please place the marker on the scale

Code	Answer list	Scripting notes	
1	Less than £500 (less than £40 per month)		
2	£500 (£20 per month)		
3	£750 (£60 per month)		
4	£1,000 (£85 per month)		
5	£1,250 (£105 per month)		
6	£1,500 (£125 per month)		
7	£1,750 (£145 per month)		
8	£2,000 (£165 per month)		
9	£2,250 (£185 per month)		
10	£2,500 (£205 per month)		
11	£2,750 (£230 per month)		
12	£3,000 (£250 per month)		
13	£3,250 (£270 per month)		
14	£3,500 (£290 per month)		
15	£3,750 (£310 per month)		
16	More than £4,000 (more than £330 per month)		
97	Don't know		

Conjoint Exercise

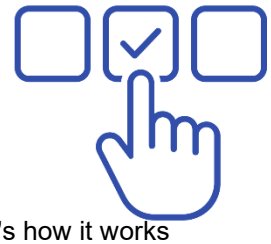
INTRO Page 1 – SHOW ON SCREEN FOR MINIMUM 5 SECONDS

Welcome to an important part of our survey. In this section, we're going to look a little bit more at your preferences around energy deals.

First, we'd like you to **reflect on your current energy deal**—think about its terms, costs, and any benefits or drawbacks you've noticed. Keep these in mind as we move forward.

Next, **you'll be shown a series of alternative energy deals** presented like the one below. These two deals are hypothetical, but we'll ask you to compare them to your current real life energy deal. This is to help us understand what might make you think about changing your current energy plan.

INTRO Page 2 – SHOW ON SCREEN FOR MINIMUM 5 SECONDS



Here's how it works

1. You will be presented with a series of **choices of energy deals**, one after the other.
2. You will have **9 choices** to consider, with each choice presenting **X deal** options.
3. If you find a deal appealing and think you would **likely switch to it in real life**, please select that deal.

Remember, there's no obligation to choose a new deal if none of them seem better than what you currently have. For each choice, **you can always choose to stick with your current deal.**

Let's get started!

ALL ATTRIBUTE SETS TO BE PRESENTED ALONGSIDE A 'STICK TO MY CURRENT DEAL' – USE CARD FORMAT, NOT TABLE
ATTRIBUTE SET 1: ESTIMATED ANNUAL PRICE SAVING

Code	Answer list	Scripting notes	Routing
1	£0 saving per year		
2	£25 saving per year		
3	£50 saving per year		
4	£75 saving per year		
5	£100 saving per year		

6	£150 saving per year		
8	£200 saving per year		
9	£300 saving per year		

ATTRIBUTE SET 2: CUSTOMER SERVICE rating (as rated by other customers)

Code	Answer list	Scripting notes	Routing
1	1 star		
2	1.5 stars		
3	2 stars		
4	2.5 stars	SHOW WITH IMAGE SIMILAR TO: ★★★★★	
5	3 stars		
6	3.5 stars		
7	4 stars		
8	4.5 stars		
9	5 stars		

ATTRIBUTE SET 3: EARLY Exit FEE if you wanted to leave this deal

Code	Answer list		Scripting notes	Routing
1	No exit fee			
2	£50 exit fee			
3	£100 exit fee			
4	£150 exit fee			
5	£200 exit fee			
6	£250 exit fee			
7	£300 exit fee			

ATTRIBUTE SET 4: TARIFF TYPE AND LENGTHS

[If ‘standard variable’ is shown, ‘No exit fee’ must always be shown from attribute set 3]

Code	Answer list	Scripting notes	Routing
1	Fixed – 12 month		
2	Fixed – 24 month		
3	Standard Variable		

Switching behaviour and perceptions

INTRO TEXT

Thanks for your responses. Now some questions about your experience and views towards switching suppliers (outside of this survey!) …

Base: All respondents who have considered switching tariffs or suppliers

CAROUSEL, SINGLE RESPONSE PER ROW, FLIP SCALE BUT SHOW SAME ORDER FOR BOTH ROWS AT RESPONDENT LEVEL

D1. Thinking about the last time you were looking at alternative energy deals (in real life!), how easy or difficult did you find it to do the following:

Please select one per item

ROWS

Code	Answer list	Scripting notes	Routing
1	Compare information on alternative deals		
2	Find deal(s) that looked preferable to your current deal		

COLUMN

Code	Answer list	Scripting notes	Routing
1	Very easy		
2	Somewhat easy		
3	Neither easy nor difficult		
4	Somewhat difficult		
5	Very difficult		
97	Don't know		

Base: Found it difficult to compare information on alternative deals (D1_1 = 4, 5)

OPEN RESPONSE, CAP WORD LIMIT AT 200

D1A. You mentioned finding it difficult to compare information on alternative suppliers. Could you please tell us more about why you found it difficult?

Please type your response in the box below

[_____]

Base: All respondents

SINGLE RESPONSE

C7. Now, thinking back to before the energy crisis in **AUGUST 2021**, how often did you tend to change your energy tariff (either by switching tariff or supplier)?

Please select only one

Fixed codes	Answer list	Scripting notes
1	Regularly (i.e. once every 1-2 years, or even more frequently)	
2	Occasionally (i.e. less than once every 2 years)	
96	Never	
97	Don't know	
98	Prefer not to say	
99	Not applicable	

Tariff understanding

INTRO TEXT

Now, some questions about energy tariffs …

Base: All respondents who say they are on fixed or variable tariff for gas (B1_A = 1-2)

SINGLE RESPONSE

E1_A. You mentioned earlier that you are currently on [PIPED BASED ON WHAT SELECTED AT B1 **fixed/variable**] energy tariff **for gas**. How confident, if at all, are you that this is the case?

Please select only one

Code	Answer list	Scripting notes	Routing
1	Very confident		
2	Somewhat confident		
3	Not very confident		
4	Not at all confident		
97	Don't know		

Now, some questions about energy tariffs …

Base: All respondents who say they are on fixed or variable tariff for electricity (B1_B = 1-2)

SINGLE RESPONSE

E2_B. You mentioned earlier that you are currently on [PIPED BASED ON WHAT SELECTED AT B1 **fixed/variable**] energy tariff **for electricity**. How confident, if at all, are you that this is the case?

Please select only one

Code	Answer list	Scripting notes	Routing
1	Very confident		
2	Somewhat confident		
3	Not very confident		
4	Not at all confident		
97	Don't know		

Base: Respondents who say they are on fixed or variable tariff for gas (B1_A = 1-2)

SINGLE RESPONSE

E2. For **gas**, would you like to be on a [PIPED BASED ON WHAT NOT SELECTED B1_A **fixed/variable**] tariff, or are you content with being on a [PIPED BASED ON WHAT SELECTED B1_A **fixed/variable**] tariff?

Please select only one

Code	Answer list	Scripting notes	Routing
1	Content on a [PIPED BASED ON WHAT NOT SELECTED B1_A **fixed/variable**] tariff		
2	Would like to change [PIPED BASED ON WHAT SELECTED B1_A **fixed/variable**] tariff		
97	Don't know		

Base: Respondents who say they are on fixed or variable tariff for gas (B1_B = 1-2)

SINGLE RESPONSE

E2. For **electricity**, would you like to be on a [PIPED BASED ON WHAT NOT SELECTED B1_B **fixed/variable**] tariff, or are you content with being on a [PIPED BASED ON WHAT SELECTED B1_B **fixed/variable**] tariff?

Please select only one

Code	Answer list	Scripting notes	Routing
1	Content on a [PIPED BASED ON WHAT NOT SELECTED B1_B **fixed/variable**] tariff		
2	Would like to change [PIPED BASED ON WHAT SELECTED B1_B **fixed/variable**] tariff		
97	Don't know		

Base: All respondents

CAROUSEL, SINGLE RESPONSE PER ROW, RANDOMISE ROWS

E3. How would you rate your understanding of the following energy tariff types?

Please select only one

ROW

Code	Answer list	Scripting notes	Routing
1	Variable tariff	SHOW AFTER/BEFORE 2	
2	Fixed tariff	SHOW AFTER/BEFORE 1	
3	Economy 7 tariff (sometimes called “time-of-use” tariff)		

COLUMN

Code	Answer list	Scripting notes	Routing
1	Very good understanding		
2	Fair understanding		
3	Limited understanding		
4	No understanding		
97	Don't know		

Base: All respondents

CAROUSEL, SINGLE RESPONSE PER ROW, RANDOMISE ROWS

E4. Please indicate whether each of the following is a feature of fixed tariffs, variable tariffs, both, or neither?

ROWS

Code	Answer list
1	Easier to budget as know how much energy will cost per unit for contract period
2	No need to monitor the market for price changes
3	Can usually switch deals without being charged an exit fee
4	If prices drop, you could pay less per unit used
5	Often no long-term commitment is required
6	Standing charges may decrease, reducing your overall energy bill

COLUMNS

Code	Answer list	Scripting notes	Routing
1	Benefit of a **variable tariff**	RANDOMISE 1-2 AT RESPONDENT LEVEL, SHOW CONSISTANT ORDER FOR EACH ROW	
2	Benefit of a **fixed tariff**	RANDOMISE 1-2 AT RESPONDENT LEVEL, SHOW CONSISTANT ORDER FOR EACH ROW	
3	Benefit of **both**	FIX	
4	Benefit of **neither**	FIX	
97	Don’t know	FIX	

ROTATE ORDER of e5 and e6 below

Base: All respondents

SINGLE RESPONSE FOR EACH SCENARIO, RANDOMISE OPTIONS AT RESPONDENT LEVEL BUT SHOW CONSISTANT ORDER TO RESPONDENT ACROSS E5 AND E6

E5. Imagine a scenario where energy prices are **predicted to rise** over the next year.

Generally speaking, would you say a fixed or variable tariff is the better tariff to be on in this scenario?

Please select only one

Code	Answer list	Scripting notes	Routing
1	A fixed tariff		
2	A variable tariff		
97	Unsure	FIX	

Base: All respondents

SINGLE RESPONSE FOR EACH SCENARIO, RANDOMISE OPTIONS AT RESPONDENT LEVEL BUT SHOW CONSISTANT ORDER TO RESPONDENT ACROSS E5 AND E6

E6. Imagine a scenario where energy prices are **predicted to fall** over the next year.

Generally speaking, would you say a fixed or variable tariff is the better tariff to be on in this scenario?

Please select only one

Code	Answer list	Scripting notes	Routing
1	A fixed tariff		
2	A variable tariff		
97	Unsure	FIX	

Exit fees

INTRO TEXT

Now, some questions about exit fees …

Base: All respondents

SINGLE RESPONSE

F1. Before taking this survey, were you aware that sometimes energy customers have to pay an exit fee to leave some energy tariff contracts early?

Please select only one

Fixed codes	Answer list	Scripting notes
1	Yes	
2	No	
97	Don't know	

Base: All respondents

CAROUSEL, SINGLE RESPONSE PER ROW, RANDOMISE ROWS

D14. Do you think the following statements about exit fees for energy contracts are true or false?

ROWS

	Answer list	Scripting notes
1	Customers may have to pay an exit fee if leaving a fixed tariff contract before it ends	SHOW AFTER OR BEFORE 2
2	Customers may have to pay an exit fee when leaving a variable tariff contract	SHOW AFTER OR BEFORE 1
3	Customers may have to pay an exit fee if they leave a fixed tariff early and move to another tariff with the **same supplier**	
5	Exit fees do not vary and are set at a standard rate	

COLUMNS

Fixed codes	Answer list	Scripting notes
1	Definitely true	
2	Probably true	
3	Probably false	
4	Definitely false	
97	Don’t know	

Base: All respondents

SINGLE RESPONSE

D15. On your current energy contract, would you have to pay an exit fee if you decided to leave your contract early?

Please select only one

Fixed codes	Answer list	Scripting notes
1	Yes	
2	No	
97	Don't know	
98	Prefer not to say	

Base: All who believe they would have to pay an exit fee (D15 =1)

SINGLE RESPONSE

D15B. And did you know about your current supplier’s exit fee when you chose them?

Please select only one

Code	Answer list	Scripting notes	Routing
1	**Yes, I definitely knew** about the exit fee		

2	**Yes, I think I knew** about the exit fee		
3	**No, I don't think I knew** about the exit fee		
4	**No, I definitely didn't know** about the exit fee		
97	Don't know / can't remember		

Base: All who knew they might have to pay an exit fee when choosing their current supplier (D15B=1 OR 2)

SINGLE RESPONSE

D15C. Did the exit fee impact your decision to choose your current supplier?

Please select only one

Code	Answer list	Scripting notes	Routing
1	Yes, it made me feel less sure about choosing them		
2	No, it didn't impact my decision		
97	Don't know / can't remember		

Base: All who didn't know they might have to pay an exit fee when choosing their current supplier (D15B= 3 OR 4)

SINGLE RESPONSE

D15D. If you had known about the exit fee, would it have impacted your decision to choose your current supplier?

Please select only one

Code	Answer list	Scripting notes	Routing
1	Yes, it would have made me **much less likely** to choose them		
2	Yes, it would have made me **slightly less likely** to choose them		
2	No, it wouldn't have impacted my decision		
97	Don't know		

Supplier satisfaction

INTRO TEXT

Now, some questions about satisfaction with energy suppliers' customer service.

Split sample AT RANDOM so that half see only G1 then G2, and half see only G3

Base: Half of total sample (group 1)

MULTIPLE RESPONSE, RANDOMISE

G1.

If you saw an energy supplier with a customer service rating of **4.5 or 5 stars out of** 5 on a comparison site, which of the following would you think would be the main factors that would have led to a high rating?

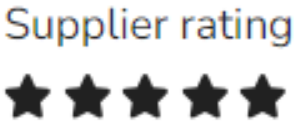
Please select up to 5

Code	Answer list	Scripting notes	Routing
1	Prompt responses to inquiries and issues		
2	Professionalism, politeness and helpfulness of staff		
3	Accuracy and clarity of billing		
4	Accessible support across various channels (e.g., phone, email, live chat)		
5	Transparency regarding tariffs and additional charges		
6	Proactive updates on service changes or disruptions		
7	Assistance with energy efficiency and consumption		
8	Availability of emergency support		
9	Straightforward processes for changing plans or tariffs		
10	Loyalty rewards and incentives		
11	Financial support for customers in need		
12	Commitment to environmental sustainability		
13	Competitive pricing and value for money		
14	Reliability of energy supply without interruptions or issues		
95	Other (please specify)	FIX, TEXT BOX	
97	Don't know	FIX, EXCLUSIVE	

Base: Selecting more than one code at G1

SINGLE RESPONSE, RANDOMISE, SHOW CODES SELECTED AT g1

G2.



And out of the options you selected, which is the most important factor in customer service **to you**?

Please select one only

Code	Answer list	Scripting notes	Routing
1	Prompt responses to inquiries and issues	SHOW IF SELECTED AT G1	
2	Professionalism, politeness and helpfulness of staff	SHOW IF SELECTED AT G1	
3	Accuracy and clarity of billing	SHOW IF SELECTED AT G1	
4	Accessible support across various channels (e.g., phone, email, live chat)	SHOW IF SELECTED AT G1	
5	Transparency regarding tariffs and additional charges	SHOW IF SELECTED AT G1	
6	Proactive updates on service changes or disruptions	SHOW IF SELECTED AT G1	
7	Assistance with energy efficiency and consumption	SHOW IF SELECTED AT G1	
8	Availability of emergency support	SHOW IF SELECTED AT G1	

9	Straightforward processes for changing plans or tariffs	SHOW IF SELECTED AT G1	
10	Loyalty rewards and incentives	SHOW IF SELECTED AT G1	
11	Enhanced support for customers in need	SHOW IF SELECTED AT G1	
12	Commitment to environmental sustainability	SHOW IF SELECTED AT G1	
13	Competitive pricing and value for money	SHOW IF SELECTED AT G1	
14	Reliability of energy supply without interruptions or issues	SHOW IF SELECTED AT G1	
95	Other (please specify)	SHOW IF SELECTED AT G1, FIX, TEXT BOX	
97	Don't know	FIX, EXCLUSIVE	

Base: Half of total sample (group 2)

OPEN RESPONSE

G3.

If you saw an energy supplier with a customer service rating of **4.5 or 5 stars out of 5** on a comparison site, what would you think would be the main factors that would have led to a high rating?

Please type your response in the box below

[_____]

Final profiling questions

INTRO TEXT

Nearly there! Now, some final questions about your energy and your circumstances more generally …

Base: All respondents

SINGLE RESPONSE

C1. Do you have a smart meter in your household?

A smart meter sends your energy supplier meter readings automatically and it also has an in home display device which shows you how much energy you are using in near real time.

Please select only one

Fixed codes	Answer list	Scripting notes
3	Yes – I have a smart meter for mains gas and electricity	SHOW IF (electricity & gas) s1=3 or s2=3
1	Yes – I have a smart meter for mains electricity	SHOW IF (electricity only) s1=2 OR s2=2 Or IF (electricity & gas) s1=3 or s2=3
2	Yes – I have a smart meter for mains gas	SHOW IF (gas only) s1=1 and s2=1 Or IF (electricity & gas) s1=3 or s2=3
4	No, but I **would** consider getting one in the future	
5	No, and I **would not** consider getting one in the future	
97	Don't know	

Base: All respondents

SINGLE RESPONSE

C1EV. Do you have an electric vehicle?

An electric vehicle is a car that runs fully or partially on electricity. It has a battery which is charged by plugging it into a power source.

Please select only one

Fixed codes	Answer list	Scripting notes
1	Yes – I have a fully electric vehicle	
2	Yes – I have a partially electric vehicle	

4	No, but I **would** consider getting one in the future	
5	No, and I **would not** consider getting one in the future	
97	Don't know	

Base: All respondents

SINGLE RESPONSE

CL1. In view of the general economic situation, do you think you will be able to save any money in the next 12 months?
Please select one only

Fixed code	Answer list	Scripting notes	Routing
1	Yes		
2	No		
97	Don't know		
98	Prefer not to say		

Base: All respondents

SINGLE RESPONSE

CL2. Could your household afford to pay an unexpected, but necessary, expense of £850?
Please select one only

Fixed code	Answer list	Scripting notes	Routing
1	Yes		
2	No		
97	Don't know		
98	Prefer not to say		

Base: All respondents

SINGLE RESPONSE

CL3. Have you had to borrow more money or use more credit than usual in the last month compared to a year ago?
Borrowing or using credit includes credit cards, overdrafts, taking out loans, and borrowing from friends, family, neighbours or other personal connections.
Please select one only

Fixed code	Answer list	Scripting notes	Routing
1	Yes		
2	No		
97	Don't know		
98	Prefer not to say		

DUMMY VARIABLE: COST OF LIVING RISK

Doing well	CL1=Yes AND CL2= Yes
Getting by	(CL1=Yes AND CL2=No) OR (CL=No AND CL2=Yes) AND CL3=No
At risk	CL1=No, and ONE of CL2=No OR CL3=Yes
At high risk	CL1=No, and BOTH of CL2=No AND CL3=Yes
UNABLE TO CLASSIFY	ALL ELSE

Base: All respondents

SINGLE RESPONSE

F5. Which one of the following statements best describes how well you are keeping up with your general household bills and credit commitments at the moment?

Please select only one

Fixed codes	Answer list	Scripting notes	Routing
1	Keeping up with all bills and commitments without any difficulties		
2	Keeping up with all bills and commitments, but it is a struggle from time to time		
3	Keeping up with all bills and commitments, but it is a constant struggle		
4	Falling behind with some bills or credit commitments		
5	Having real financial problems and have fallen behind with many bills or credit commitments		
6	Don't have any bills or credit commitments		
97	Don't know		
98	Prefer not to say		

Base: All respondents

single RESPONSE

F5A. And which one of the following statements best describes how well you are keeping up with **energy bills** specifically at the moment?

Please select only one

Fixed codes	Answer list	Scripting notes	Routing
1	Keeping up with energy bills without any difficulties		
2	Keeping up with energy bills, but it is a struggle from time to time		
3	Keeping up with energy bills, but it is a constant struggle		
4	Falling behind with some energy bills		
5	Having real financial problems and have fallen behind with energy bills		

6	Don't have any energy bills		
97	Don't know		
98	Prefer not to say		

Base: all respondents

SINGLE RESPONSE

H1.

What is **your annual household income** before tax and other deductions?

Please select one only

Row Code	Row list	Scripting notes	Routing
1	Less than £5,000		
2	£5,000 to less than £10,000		
3	£10,000 to less than £15,000		
4	£15,000 to less than £20,000		
5	£20,000 to less than £25,000		
6	£25,000 to less than £30,000		
7	£30,000 to less than £35,000		
8	£35,000 to less than £45,000		
9	£45,000 to less than £50,000		
10	£50,000 to less than £55,000		
11	£55,000 to less than £60,000		
12	£60,000 to less than £80,000		
13	£80,000 or over		
97	Unsure		
98	Prefer not to say		

Base: All respondents

MULTI RESPONSE

H12. **INCLUDING YOURSELF,** which of the following groups live in your household?

Please select all that apply and indicate the number of people in the household INCLUDING YOURSELF

Fixed codes	Answer list	Scripting notes	Routing
1	Someone who is expecting (currently pregnant)	NUMERIC – MAX 10	
2	Children aged under 5	NUMERIC – MAX 20	

3	Children aged 5-15	NUMERIC – MAX 20	
4	Adults aged 16-64	NUMERIC – MAX 20	
5	Adults aged 65+	NUMERIC – MAX 20	
98	Prefer not to say		

Base: All respondents

ONLINE OUTRO

You have reached the end of the survey. Thank you for taking the time to answer our questions. Your input is really appreciated.

Please **click next** to submit your responses.

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